Form Report, **May 18, 2007**

GENERAL INFORMATION	
Title:	Commonwealth Technology Portfolio phase 2
Working Title:	IT Portfolio
Proponent Secretary:	184 Secretary of Technology
Proponent Agency:	136 Virginia Information Technologies Agency
Prepared By:	Gary Weaver
Date Finalized:	
Control Number:	836

EXPENDITURES AND PERFORMANCE

Project Deliverables

List all Project Deliverables and the date each was accepted by the user. Identify any contingencies or conditions related to the acceptance:

Deliverable Name	Date Accepted	Contingencies or Conditions
Training Orientation completed	May 31, 2006	Training orientation by Serco (vendor)
Software and installation acceptance	May 31, 2006	Software support training, server installation, 250 user licenses
Requirements Definition Documentation	Jul 27, 2006	Mutual agreement on definition of acceptance for meeting each requirement
Completion of Phase 1 & 2– IT Project Portfolio Status reporting through the implementation of ProSight's Fast-track Solution for Project Portfolio Management (PPM) components and base Portfolios product	Sep 22, 2006	Setup of Commonwealth Technology Portfolio (CTP) framework and form/scorecard structure, completion of configured software modules.
API training	Sep 23, 2006	Training for DBA in using API tool
Solution Acceptance by VITA of Phase 1& 2 by 1 Oct 2006.	Sep 23, 2006	User Acceptance testing of CTP
Completion of Phase 3– Resource Management through the implementation of the ProSight Portfolios Bridge for MS Project Server 2003 and ProSight's Resource Manager (PRM) solution by 1 Oct 2006.	Sep 8, 2006	User acceptance of MSP bridge and PRM module interface (for next phase of the project)
Solution Acceptance by VITA of Phase 3	Oct 5, 2006	Included certification of ITIM processes by Paragon, Inc. (second vendor)
End-User Training completed and Training Materials Approved by VITA	Oct 6, 2006	Delivery of training materials for train-the-trainer
IV&V Reports	May 30, 2007	Last deliverable; post close-out report

Performance Baseline

Document how the project performed against each Performance Goal established in the Project Performance Plan.:

Commonwealth Critical Issues	Project Business Objectives	Performance Goal	Results
		Overall Goal:	
Commonwealth Strategic Plan for Technology – Goal 4 – Create a reputation of performance for technology; Objective 4.1 Provide technology in an accountable, responsive, open and results oriented manner; Initiative 4, Implement an enterprise-wide IT portfolio management system for improved management of technology investments.	Improve the Commonwealth's ability to track IT expenditures and manage IT investments	Provide a means for better analysis of the technology portfolio for the CIO and ITIB investment decisions (overall goal)	The methodology for ensuring implementation of an enterprise-wide IT portfolio management system for improved management of technology investments was based on completion of the following sub-goals:
		Initiation Phase sub-goals:	
		CIO Approval of the Proposal and Charter, review and confirmation of approval in Sep 2005	The CIO approved the Proposal and Charter in Sep 2005.
		A CIO approval for release of the Request for Proposal (RFP) in Oct 2005.	The CIO approved the release of the Request for Proposal in Oct 2005.
		Receive substantive proposals from multiple qualified vendors responding to RFP in Nov 2005.	VITA received four (4) substantive proposals from qualified vendors responding to the RFP in Nov 2005
		CIO approval of a contract award for a COTS-solution IT Portfolio by Apr 2006	The CIO approved contract award to Serco, Inc for ProSight Portfolios in Apr 2006.
		Planning Phase sub-goals	
		Internal Agency Oversight Committee (IAOC) approval of the Project Plan in Apr 2006.	The IAOC approved the Project Plan in Apr 2006.
		Execution phase sub-goals:	
		The successful start of the project execution phase with 100% team availability and completion of all project-opening meetings in May 2006.	The project execution phase started successfully with 100% team availability and completion of all project-opening meetings in May 2006.
		Successful implementation of all solutions for initial IV&V findings and recommendations by May 2006	The project team successfully implemented all solutions for initial IV&V findings and recommendations by May 2006.
		Successful implementation of all solutions for mid-IV&V findings and recommendations by Sep 2006	The project team successfully implemented all solutions for mid- IV&V findings and recommendations by Sep 2006.

		Successful validation (100%) of data and testing of all requirements for the Commonwealth IT Portfolio completed	The team successfully validated (100%) of data and testing for requirements of the Commonwealth IT Portfolio in Oct 2006 by completing the following test sub-goals:
		Test sub-goals:	
		Phase 0 Acceptance test	Phase 0 Acceptance test was completed in Jun 2006
		Requirements Definition Document (RDD) Completed	Requirements Definition Document (RDD) was completed in Jul 2006
		ITIM Standard draft provided for ProSight process coordination by Sep 2006	ITIM Standard draft provided for ProSight process coordination in Sep 06
		Phase 1 Acceptance Test in Aug 2006	Phase 1 Acceptance Test was completed in Aug 2006
		Phase 2 Acceptance Test Phase in Sep 06	Phase 2 Acceptance Test was extended two weeks but did complete in Sep 06
		Phase 3 Acceptance Test in Oct 06	Phase 3 Acceptance Test was completed early in Sep 2006
		Closeout Phase sub-goals:	
		Capture of all final IV&V findings for next phase of Commonwealth Technology Project in May 2007	Awaiting final draft of IV&V findings
		Capture 80% of the information needed for IT strategic planning in Dec 2006	The first and second data migrations (80%) was completed in Dec 2006
		Successful implementation of all ITIB recommendations for the IT Portfolio tool stemming from tool recommendations (19 Apr 2006)	All ITIB recommendations for the IT Portfolio tool stemming from tool recommendations on19 Apr 2006 were completed in April 2006.
		Successful validation (100%) of processes, data and testing of all requirements for the IT Project Portfolio by Oct 2006	Successful validation (100%) of processes, data, and testing of all requirements for the IT Project Portfolio were completed in Oct 2006 except for training validation. Lack of role-based training products caused the extension of the project schedule by two months.
		VITA Project Portfolio Model is ready for next phase of project (roll-out to agencies) by Mar 2007	The CIO and IAOC approved extension of this MOS by three months. The Project was ready for the next phase by Mar 29 2007
		IT Portfolio captures 80% of the information needed for the 2007 Recommended Technology Investment Projects Report (RTIP)	The IT Portfolio was validated for capturing 80% of the information needed for the 2007 Recommended Technology Investment Projects Report (RTIP) at the Feb 16, 2007 ITIB meeting.

		The Commonwealth IT Portfolio provides sufficient information to support ITIB investment decisions	The IT Portfolio was validated for provides sufficient information to support ITIB investment decisions at the Feb 16, 2007 ITIB meeting.
		Successful capture of all best practices and lessons learned for the Project Management Information Clearinghouse	Successful capture of all best practices and lessons learned for the Project Management Information Clearinghouse was completed in May 2007.

Cost Budget Baseline

State the Planned Cost for the project, as approved in the Initial Cost Baseline and the Project Charter. State the Actual Cost at completion. Document and explain all cost variances, including approved changes to the cost baseline.:

Category	Planned	Actual	Variance	Explanation
Internal Staff	967,015	591,514	+375,501	Charter included more SME hours than required... Scope delimitation reduced manpower.
Software	482,774	313,272	+169,502	Serco contract was under the estimated costs. Cost of PRM licenses was minimized.
Hardware	36,000	18,000	+18,000	Did not acquire development server. Did not upgrade training server.
Services	1,039,195	977, 433	+61,762	Serco contract under the estimated costs; included additional $96,500 for Marketing approved by IAOC
Maintenance	165,935	119,364	+46, 571	Serco contract was under the estimated costs.
Training	51,000	0	+51,000	Training cost was included in overall Serco contract
Risk		31,433	-31, 433	Paid additional EASS technical staff support for 3 months (schedule extension)
IV&V	90,000	98,500	-8,500	Cost was slightly higher than estimated.
Total	$2,831,919	2,149,516	+682,403	+306,902 were available from estimated Services costs at project closure.

Funding

State the Planned Funding for the project, as approved in the Initial Cost Baseline and the Project Charter. State the Actual Funding at completion. Document and explain all funding variances, including approved changes to the cost baseline:

Funding Category	Planned	Actual	Variance	Explanation
General Fund	$300,000		-$300,000	The General Assembly had directed all agency costs come from Non-General funds.
Non-General Fund	$2,531,919	$2,831,919	+$300,000	
Federal				
Other				
Total	$2,831,919	$2,831,919		

Schedule Baseline

Compare the initial approved schedule baseline against the actual completion dates. Enter the planned start and finish dates from the initial schedule baseline. Document all actual start, finish dates, and explain any schedule variances, including approved changes to the schedule baseline

	WBS Elements Activity or Task	Planned Start Date	Actual Start Date	Planned Finish Date	Actual Finish Date	Variance	Explanation
1	IT Portfolio Project	5/2/2005	5/2/2005	1/26/2007	5/15/2007	3.5 months	Schedule extension approved by IAOC for building training materials and providing extensive agency training
1.1	INITIATING PHASE	5/2/2005	5/2/2005	10/27/2005	10/27/2005		
1.1.1	Conduct Project Analysis	5/2/2005	5/2/2005	5/18/2005	5/18/2005		
1.1.2	Requirements Definition	5/27/2005	5/27/2005	9/23/2005	9/23/2005		
1.1.3	Prepare Proposal & Charter	5/16/2005	5/16/2005	9/7/2005	9/7/2005		
1.1.4	ITIB Approval Process	8/31/2005	8/31/2005	9/20/2005	9/20/2005		
1.1.5	Proposal & Charter Approval	9/21/2005	9/21/2005	9/21/2005	9/21/2005		
1.1.6	CIO Approval/ITIB Concurrence for Charter/Proposal (MOS)	9/21/2005	9/21/2005	9/21/2005	9/21/2005		
1.1.7	Prepare APR	8/29/2005	8/29/2005	9/20/2005	9/20/2005		
1.1.8	APR Approval	9/21/2005	9/21/2005	9/21/2005	9/21/2005		
1.1.9	Internal Portfolio Status Updates	9/22/2005	9/22/2005	10/27/2005	10/27/2005		
1.1.10	Internal Portfolio Weekly Updates (Initiation Phase)	5/26/2005	5/26/2005	9/29/2005	9/29/2005		
1.1.11	CATSPA Updates (Initiation Phase)	8/2/2005	8/2/2005	9/29/2005	9/29/2005		
1.2	PLANNING PHASE	5/2/2005		7/28/2006	7/28/2006		
1.2.1	RFP Initiation Process	9/21/2005		10/14/2005	10/14/2005		
1.2.2	CIO RFP Approval	10/14/2005		10/14/2005	10/14/2005		
1.2.3	CIO RFP Approval (MOS)	10/17/2005		10/17/2005	10/17/2005		
1.2.4	RFP Release Process	10/17/2005		11/28/2005	11/28/2005		
1.2.5	Receive substantive proposals from multiple qualified vendors (MOS)	11/18/2005		11/18/2005	11/18/2005		
1.2.6	RFP Evaluation	10/18/2005		12/20/2005	12/20/2005		
1.2.7	Supplier Demonstration Preparation	12/30/2005		2/6/2006	2/6/2006		
1.2.8	Complete Contract	2/13/2006		3/29/2006	4/13/2006	2 weeks	Extended contract negotiations
1.2.9	CIO RFP Contract Approval	4/13/2006		4/23/2006	4/23/2006		
1.2.9.1	Posted Notice Period for Contract Award	4/13/2006	4/13/2006	4/23/2006	4/23/2006		
1.2.10	CIO/ITIB Approval of contract (MOS)	4/13/2006	4/13/2006	4/13/2006	4/13/2006		

	WBS Elements Activity or Task	Planned Start Date	Actual Start Date	Planned Finish Date	Actual Finish Date	Variance	Explanation
1.2.11	Award Official	4/24/2006	4/24/2006	4/24/2006	4/24/2006		
1.2.12	Weekly Status Reports PMD/IAOC Chair (Planning Phase)	10/5/2005	10/5/2005	4/19/2006	4/19/2006		
1.2.13	Internal Portfolio Weekly Updates (Planning Phase)	10/6/2005	10/6/2005	4/13/2006	4/13/2006		
1.2.14	Initiate Project in Dashboard	10/11/2005	10/11/2005	4/11/2006	4/11/2006		
1.2.14.1	Project Status Updates (Planning Phase)	10/11/2005	10/11/2005	4/11/2006	4/11/2006		
1.2.15	CATSPA Updates (Planning Phase)	10/3/2005	10/3/2005	3/3/2006	3/3/2006		
1.2.16	IAOC Meetings (Planning Phase)	11/21/2005	11/21/2005	3/27/2006	3/27/2006		
1.2.17	Finalize Project Funding Source	1/6/2006	1/6/2006	1/25/2006	1/25/2006		
1.2.18	Prepare Project Plan Draft	12/16/2005	12/16/2005	7/28/2006	7/28/2006		
1.2.19	Project Plan Finalization	2/22/2006	2/22/2006	4/13/2006	4/13/2006		
1.2.20	IAOC Project Plan Approval	4/4/2006	4/4/2006	4/17/2006	4/17/2006		
1.2.20.1	Project Plan Coordination within VITA	4/4/2006	4/4/2006	4/17/2006	4/17/2006		
1.2.20.2	IAOC Project Plan Approval (MOS)	4/17/2006	4/17/2006	4/17/2006	4/17/2006		
1.2.21	Contractor Staff Support Procurement/SME ID Tasks	5/2/2005	5/2/2005	3/13/2006	3/13/2006		
1.2.22	Business Rule and Requirements Review Tasks	3/13/2006	3/13/2006	4/3/2006	4/3/2006		
1.2.23	Project Team Kick-off Meetings	4/24/2006	4/24/2006	4/28/2006	4/28/2006		
1.2.24	Initial IV&V	4/25/2006	4/25/2006	6/1/2006	6/1/2006		
1.2.24.1	Initial IV&V Start	4/25/2006	4/25/2006	6/1/2006	6/1/2006		
1.2.25	Complete Project Execution & Control Transition Checklist	4/24/2006	4/24/2006	4/24/2006	4/24/2006		
1.3	EXECUTING PHASE	4/10/2006	4/10/2006	12/18/2006	3/28/2007		Schedule extension approved by IAOC for building training materials and providing extensive agency training
1.3.1	Project Start	4/26/2006	4/26/2006	4/26/2006	4/26/2006		
1.3.2	Successful Project Execution Start (MOS)	4/26/2006	4/26/2006	4/26/2006	4/26/2006		
1.3.3	Daily Team Meeting/Project Status Meetings	4/20/2006	4/20/2006	11/29/2006	3/28/2007	4 months	Schedule extension approved by IAOC
1.3.4	Bi-weekly Risk Management Reviews	4/24/2006	4/24/2006	11/20/2006	3/28/2007	4 months	Schedule extension approved by IAOC
1.3.5	Weekly Risk Management Team Meetings	4/25/2006	4/25/2006	11/28/2006	3/28/2007	4 months	Schedule extension approved by IAOC
1.3.6	IAOC Meetings (Executing Phase)	4/10/2006	4/10/2006	11/13/2006	3/28/2007	4 months	Schedule extension approved by IAOC for building training materials and providing extensive agency training
1.3.7	Maintain Change Control	4/21/2006	4/21/2006	11/27/2006	3/28/2007	4 months	Schedule extension approved by IAOC
1.3.8	Maintain Issue Log	4/25/2006	4/25/2006	11/29/2006	3/28/2007	4 months	Schedule extension approved by IAOC

	WBS Elements Activity or Task	Planned Start Date	Actual Start Date	Planned Finish Date	Actual Finish Date	Variance	Explanation
1.3.9	Weekly Status Reports PMD/IAOC Chair (Executing Phase)	4/19/2006	4/19/2006	11/29/2006	3/28/2007	4 months	Schedule extension approved by IAOC
1.3.10	Internal Portfolio Updates (Executing Phase)	4/20/2006	4/20/2006	11/30/2006	3/28/2007	4 months	Schedule extension approved by IAOC
1.3.11	CATSPA Update (Executing Phase)	5/2/2006	5/2/2006	11/2/2006	11/2/2006		
1.3.12	Dashboard Updates (Executing Phase)	5/11/2006	5/11/2006	11/13/2006	3/11/2007	4 months	Schedule extension approved by IAOC
1.3.13	CATSPA Maintenance	4/26/2006	4/26/2006	11/29/2006	2/29/2007	3 months	Schedule extension approved by IAOC
1.3.14	Monthly Project Plan reviews	5/1/2006	5/1/2006	12/4/2006	3/2/2007	3 months	Schedule extension approved by IAOC
1.3.15	IT Portfolio Tool Implementation	4/26/2006	4/26/2006	10/9/2006	10/13/2006	4 days	User Acceptance Test required additional time
1.3.15.1	Server Installation/Checkout	4/26/2006	4/26/2006	5/11/2006	5/11/2006		
1.3.15.2	Initial Portfolio Training	5/1/2006	5/1/2006	5/10/2006	5/10/2006		
1.3.15.3	IT Portfolio Interface Design Tasks	5/5/2006	5/5/2006	6/19/2006	6/19/2006		
1.3.15.4	IT Portfolio Data Migration Tasks	5/5/2006	5/5/2006	7/12/2006	7/26/2006	2 weeks	Additional time needed because of Microsoft Excel data truncation errors.
1.3.15.5	IT Portfolio Business Rule Finalization Tasks	5/18/2006	--	6/5/2006	--	--	Task was deleted due to scope limitation
1.3.15.5.1	VITA BPR outline	5/18/2006	--	6/5/2006	--	--	Task was deleted due to scope limitation
1.3.15.6	IT Portfolio Tool Configuration Tasks	6/5/2006	6/5/2006	7/24/2006	7/24/2006		
1.3.15.7	IT Portfolio Validation & Test Tasks	5/11/2006	5/11/2006	8/1/2006	8/1/2006		
1.3.15.7.1	Prepare test plan	5/11/2006	5/11/2006	7/21/2006	7/21/2006		
1.3.15.7.2	Test plan coordination	7/26/2006	7/26/2006	8/1/2006	8/1/2006		
1.3.15.7.3	IT Portfolio Test Plan Approved (Deliverable)	8/1/2006	8/1/2006	8/1/2006	8/1/2006		
1.3.15.8	Phase 1 &2 Solution Acceptance Testing	7/24/2006	7/24/2006	10/9/2006	10/13/2006	4 days	User Acceptance Test required additional time
1.3.15.9	ITIB Coordination	7/19/2006	7/19/2006	8/18/2006	8/18/2006		
1.3.15.10	ITIM Standard process validation	5/26/2006	5/26/2006	7/27/2006	--		(External dependency) ITIM Standard implementation postponed
1.3.15.11	PMD Standard/Guideline Update Tasks	5/15/2006	5/15/2006	9/15/2006	9/15/2006		
1.3.15.12	2006 RTIP report generated	9/1/2006	9/1/2006	9/1/2006	9/1/2006		
1.3.15.13	Process Manual preparation tasks	6/1/2006	6/1/2006	9/7/2006	9/7/2006		
1.3.16	Mid IV&V	7/17/2006	7/17/2006	9/18/2006	9/18/2006		
1.3.17	IT Portfolio Marketing Plan Tasks	10/10/2006	10/10/2006	11/7/2006	4/15/2007	5 months	Schedule extension approved by IAOC, did not increase contract cost
1.3.18	ITIM Standard/ IT Portfolio Training (Stakeholders)	10/10/2006	2/2/2007	12/28/2006	3/24/2007	3 months	Schedule extension approved by IAOC ITIM overview was conducted
1.3.19	Final Data Conversion Tasks	11/29/2006	2/18/2007	12/18/2006	2/14/2007	3 months	Schedule extension approved by IAOC

	WBS Elements Activity or Task	Planned Start Date	Actual Start Date	Planned Finish Date	Actual Finish Date	Variance	Explanation
1.3.20	Capture 80% of information needed for IT strategic planning (MOS)	12/18/2006	12/18/2006	12/18/2006	12/18/2006		
1.3.22	Portfolio captures 60% of information for 2007 RTIP (MOS)	12/18/2006	2/16/2007	12/18/2006	2/16/2007	3 months	Schedule extension approved by IAOC. Validation was at ITIB quarterly meeting.
1.3.23	Go Live	12/18/2006	3/29/2007	12/18/2006	3/29/2007	3 months	Schedule extension approved by IAOC
1.3.24	Project Execution & Control Transition Checklist Completed	12/18/2006	3/29/2007	12/18/2006	3/29/2007	3 months	Schedule extension approved by IAOC
1.4	CLOSEOUT PHASE	12/19/2006	4/1/2007	1/26/2007	5/25/2007	3.5 months	Schedule extension approved by IAOC
1.4.1	Closeout Start	12/19/2006	4/1/2007	12/19/2006	4/1/2007	3.5 months	Schedule extension approved by IAOC
1.4.2	Closeout IV&V	12/20/2006	5/2/2007	1/26/2007	5/15/2007	3.5 months	Schedule extension approved by IAOC
1.4.3	Closeout Actions (Legacy Systems)	1/4/2007	4/2/2007	1/4/2007	4/2/2007	3 months	Schedule extension approved by IAOC
1.4.4	Project Closure Report Tasks	12/19/2006	4/2/2007	1/23/2007	4/29/2007	3 months	Schedule extension approved by IAOC
1.4.5	Project Closeout Transition Checklist Completed	1/23/2007	4/22/2007	1/23/2007	4/22/2007	3 months	Schedule extension approved by IAOC
1.4.6	CIO Approval of Project Closeout	2/25/2007	5/25/2007	2/25/2007	5/25/2007	3 months	Schedule extension approved by IAOC

Description of the IAOC, CIO, ITIB Approved Schedule Change (Oct 06):
Training and training delivery were on the project critical path
Additional time was needed to accomplish planned corrective actions
Retesting automatically delayed the project end date.
Project team considered a number of options to address the training problem and remain on schedule.
None of the options proved viable.
We needed to restructure the "train the trainer" materials delivered by Serco to emphasize role-based functional and technical training.
The training documentation, as presently configured and evaluated during user testing, placed too much emphasis on tool navigation at the expense of user understanding of assigned roles and supporting business processes.
Impact of the baseline change schedule extension:
VITA still met the ITIB goal of having the ProSight tool implemented to support the 2007 strategic planning and RTIP reporting cycles.
Revised schedule was more responsive to agency concerns regarding "too many changes (from VITA) over too short a period of time".
Schedule extension allowed PMD to resource and balance day-to-day operations with project implementation.
Schedule extension delivered a better training product that avoided anticipated negative agency feedback.
Schedule extension provided adequate time to fully develop customized role-based training.
Agency feedback has been positive to the training and ProSight!
Benefits of the baseline change schedule extension:
Systems implementation followed directly after training delivery; avoided lapse of knowledge during end of year holidays.
Provided more time for agencies to plan and register for training.

Planned the implementation of the ProSight tool with planned ITIM Standard promulgation; puts tool usage in context. (ITIM Standard postponed)
Provided additional time to correct test issues and retest.
Technical implementation continued on schedule.
Minimal increase in cost (within available budget).
Drawbacks of the baseline change schedule extension:
Missed CIO Objective (D3) target date by three months.
CATSPA and Dashboard had to be maintained three extra months.
Project Internal Labor remained on project three more months

SCOPE
1   **Original Approved Charter Scope Statement**

The Original Approved Project Scope statement displays below. (non-editable) Project Scope defines all of the products and services provided by a project, and identifies the limits of the project. The Project Scope establishes the boundaries of a project and addresses the who, what, where, when, and why of a project.

The IT Portfolio Project will automate portfolio and project management and related functions through implementation of an integrated project and portfolio management COTS product

The project will deliver a COV IT Portfolio and a VITA IT Portfolio

The Commonwealth level functionality will include IT portfolio/investment management, strategic IT planning, project oversight and dashboard reporting at the Commonwealth level

The VITA level functionality will include *project management*, work flow/process, document management, *resource management*, project cost accounting, *time reporting,* and dashboard reporting at the agency level. Also included in the project plan will be VITA IT Portfolio milestones *for Business Process Reengineering (BPR) related to VITA functionality*, VITA Internal Portfolio implementation and launching of an Agency Project Portfolio Model

(The IAOC in Aug 2006 approved a scope statement change amendment of the bold print section)

3   **Scope Change 1**

The VITA level functionality will include *implementation of Commonwealth investment and project management standards*, work flow/process, document management, project cost accounting and dashboard reporting at the agency level. Also included in the project plan for the next project phase will be *VITA business process definition,* VITA Internal Portfolio implementation, and launching of an Agency Project Portfolio Model *for operational management processes, resource management, and time reporting.*

(Changes denoted by italics)

4   **Scope Change Impact 1**

Project completed Project Resource Module (PRM) evaluation (29 -31 Aug)
Project will dedicate unallocated current project phase 2 funds to next project (phase 3)
Realigned current phase 2 project personnel after current project test activities (mid-Sep)
Presented solution recommendations for the next project phase 3 to the IAOC-decision was to move forward in FY08 dependent on funding availability.

	O&M

	Operations and Maintenance Plan

Describe the plan for operation and maintenance of the product, goods, or service delivered by the project. State the projected annual cost to operate and maintain the product, good, or service. Identify where and why this projection of cost differs (if it differs) from the Project Proposal. If the operation and maintenance plan is not in place, what is the target date for the plan and what is the impact of not having operations and maintenance for the product, goods, or services in place.

The Commonwealth Technology Portfolio operations plan is integrated within the Commonwealth Information Technology Infrastructure Library (ITIL) services. Customer care is provided through the VITA Customer Care Center. A help tree is in place to correctly forward customer service requests. PMD personnel are trained in the Peregrine help desk software to assist in monitoring and assigning service tickets. PMD personnel are application administrators. Northrop Gruman personnel provide data base administration. Configuration change updates are entered in the Peregrine system as service requests for server support. An internal configuration control board provides configuration control for the application. PMD is in the process of soliciting agencies for additional license requests, and the formation of a Commonwealth CTP ProSight User's group.

Category	Original Planned	FY08 Planned	Variance	Explanation
NG Services*	$0	$14,000	-$14,000	*IT Partnership costing was not implemented when project proposal was completed. Database Support For FY08 4 hours a month to do maintenance, patches, etc. = $3,840. Windows server support 5 hours per month to work within VITA on Portfolio = $5,340 Application Administration (SAS) 5 hours per month to work on Portfolio = $4,500 For FY09 adjusted for license growth.
EASS Tech Staffing Support	$0	$68,000	-68,000	Proposal estimated VITA internal labor support instead of contracted staff augmentation5 FTE API support/interface support/report writing (Terrance Addison)
Software license maintenance**	$99,300	$125,00 ($65,000)	+$34,300	License maintenance cost was lower than estimated. ** Based on 500 licenses in FY08 and 750 licenses in FY09; agencies would pay O&M license cost above 250 licenses. $65,000 in FY08 and $130,000 in FY09 is recouped by VITA for license O&M fees from agencies
Backup/ Recovery Support	$1,000	$1,000	$0	Tape backups and offsite storage
Training/ Conferences	$6,000	$12,000	$-6,000	Estimate did not factor User conference costs. One ProSight training and user conference attendance
Hardware	$18,000	$9,000	+$9,000	VM Server space, (3)@$250a month for FY08, (fewer servers than estimated)
Serco Business configuration support	$0	$70,000	-$70,000	Estimate did not take into consideration yearly system enhancements and RTIP preparations .Provides 540 hours each FY for ProSight business configuration technical support from Serco contractor
Services Total	$124,300	$299,000	$-114,700	
Internal Labor Total	$34,800	$0	$+34,800	Estimate had a new Tech staffing and NG services support being done by a new VITA internal labor resource

O&M Funding Source ($299,000)

	Planned	Actual	Variance	Explanation
General Fund				.
Non-General Fund	$159,100	$299,000	139,900	O&M costs were under estimated. due to lack of consideration of yearly configuration maintenance and the impact of the IT Partnership implementation
Federal				
Other				
Total	$159,100	$299,000	139,900	

RESOURCES

Project Resources

List the Resources specified in the Resource Plan and used by the project. Identify to whom each resource was transferred and when it was transferred. Account for all project resources utilized by the project.

Resource	Person or Organization Who Received Resource	Turnover Date	
Project Team	VITA		
Gary Weaver, Project Manager, VITA PMD, full-time		21 May 2005	
Constance Scott, Functional Lead, COV Portfolio, VITA PMD, part-time			
Melinda Deitrick, Functional Lead, VITA Portfolio, VITA BSS, part-time			
Jim Adams, Technical Lead, VITA BSS, full-time			
George Williams, VITA PMD, part –time			
Jan Van Horn, VITA PMD, part –time			
Pat Reynolds, VITA PMD, part –time			
Paragon, Business Analyst, (contracted), part-time			
Serco, Consultants, (contracted), part-time			
Pat Morrissey, Developer, VITA EASS, part-time		4 April 2006	
Alfred Brown, DBA/Architect/NG, part-time			
Terrance Addison, Administrator, contracted, part time-time			
Venkatesh, Kodangal, Quality Assurance Tester/ Developer, contracted, full-time			
		15 Apr 2006	
Software Tools			
ProSight	VITA	4 April 2006	

Identify all project documentation materials stored in the project library or other repository. Identify the type of media used and the disposition of the project documentation (see Communications Plan).

There is a total of 793 files (2.5G) stored in 450 folders for the project currently archived on the VITA drive MAC1/IT Portfolio. All reports and documents will be moved to the SharePoint Services site interfaced with ProSight in the summer of 2007. The project proposal and charter are also stored within the current ProSight document repository. Additionally, there are 671 files (255 Mb) in use within 103 folders for the operational system stored on the VITA drive MAC1/Commonwealth Technology Portfolio – ProSight. These files will transition to the VITA Intranet PMD SharePoint Services site at some future date (TBD).

Lessons Learned

Identify Lessons Learned for feedback to the Commonwealth Project Management process. Lessons Learned should be stated in terms of Problems (or issues) and Corrective Actions taken. Provide a brief discussion of the problem that identifies its nature, source, and impact. Site any references that provide additional detail. References may include project reports, plans, issue logs, change management documents, and general literature or guidance used that comes from another source.

Statement of Problem	Discussion	References	Corrective Actions
Project team continuity is critical to success:	Motivated internal team, contractor staff; had team continuity throughout project phases into operational use.	Weekly IAOC reports; Resource Plan, Risk Management Plan	Reviewed biweekly as a top five risk
Requests for Information (RFIs) are invaluable when preparing project estimates and accomplishing contract negotiations when the agency does not have prior product experience	Project had access to dozens of responses to an RFI conducted prior to project start.	Serco contract, RFP evaluation files	Services costs were negotiated even lower than estimated; no significant services increases during project; able to add marketing plan costs and additional tech staff augmentation costs with minimal impact.
Even with Commercial off the Shelf (COTs) products a detailed technical implementation plan is important	The project's software installation, server stand ups, knowledge transfer to tech staff all were accomplished on time.	Weekly IAOC reports, Project Schedule	Technical implementation plan and architecture were approved prior to contract approval.
Always accomplish Business Process Re-engineering first	The completion of process improvements, documentation, integration and tool configuration was difficult since business processes were still under development from the IT Partnership stand-up	Weekly IAOC reports, Project Schedule, IAOC briefing, 28 Aug 06, Change Control Request, 9 Oct 06,	Weekly software configuration meetings to review captured processes.
Provide additional resources for training in projects to ensure customer satisfaction	Training needed additional time and manpower to provide a quality product for agency users.	Weekly IAOC reports; IAOC briefing 28 Sep, Change Control Request, 9 Oct 06, Resource Plan	Additional PMD (internal labor) resources we assigned to complete training materials. A project extension was approved by

Statement of Problem	Discussion	References	Corrective Actions
			the CIO.
Increase resources for communication to agency users	A change management plan would have helped in alleviating customer concerns over the process transformations that occurred.	Communication Plan, ITIM Marketing Plan	An overall change management plan for VITA should encompass all changes affecting customers and their implementation timing.
Impact of COTS solution can be significant on O&M costs	More attention must be paid to estimating out year costs for COTS solutions.	Proposal, Cost Benefit Analysis, Budget Plan	VITA needs to capture historical data for O&M costs for COTS applications.
No software was available to conduct load testing	VITA does not possess software tools to conduct stress and load testing	User Acceptance Report	VITA needs to acquire software tools to support testing.
VITA implementation team resources are spread thin:	The project manager had to accept dual responsibilities as project manager and system administrator	Resource Plan	A Maintenance and Staffing Plan should be completed and approved as a part of the Implementation phase so that the correct number and types of staff members can be hired.

Dates for Post Implementation Review and Report

Identify the date for completing the post implementation report and the person responsible for this action.

Action	Date	Responsible Person
Post - Implementation Review	Jan 2008	PMD Staff
Post - Implementation Report	Feb 2008	Gary Weaver, PM

Approvals+		
1		
Project Manager (Mandatory)		

Name	Date
Gary Weaver	19 May 2007

2	IAOC Review	
Internal Agency Oversight Committee:	Reviewed by Briefing on 15 May 2007—	

3

Business Owner (Mandatory)

Name	Date
N. Jerry Simonoff	6/1/07

Name	Date
James T. Roberts	6/1/2007

4

Project Sponsor (Mandatory)

Name	Date
Lem Stewart	6/1/2007

5

Program/Agency Management

Name	Date
Dan Ziomek	31 May 2007

6

Project Management Department (PMD):

Name	Date
Chris Hinkle	29 May 2007

7

Chief Information Officer (CIO):

Name	Date
CIO is also project sponsor	N/A